





# INDIANA UNIVERSITY FORT WAYNE

## OFFICE OF STUDENT FINANCIAL SERVICES

### 2019-2020 Dependent Household Worksheet

#### Section 3

*Do not leave this section blank. Amounts listed should reflect amount at the time the FAFSA was filed.*

Student	Parent(s)	
\$	\$	At the time the FAFSA was filed, the balance of cash, savings and checking accounts
\$	\$	At the time the FAFSA was filed, the net worth of your investments, including real estate (excluding the home in which you live)
\$	\$	At the time the FAFSA was filed, the net worth of your current businesses and/or investment farms? (Do not include a family farm or family business with 100 or fewer full-time employees)

#### NOTES

Net worth means value minus debt at the time you filed the FAFSA. If net worth is negative, enter 0.

**Investments include** real estate (do not include the home you live in), trust funds, UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, installment and land sale contracts (including mortgages held), commodities, etc. Investments also include qualified educational benefits or education savings accounts (e.g. Coverdell savings accounts, 529 college savings plans and the refund value of 529 prepaid tuition plans). For a student who must report parental information, the accounts are reported as parental investments, including all accounts owned by the student and all accounts owned by the parents for any member of the household.

**Investments do not include** the home you live in, the value of life insurance, retirement plans (401[k] plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.) or cash, savings and checking accounts already reported. Investments also do not include UGMA and UTMA accounts for which you are the custodian, but not the owner.

Investment value means the balance or market value of these investments at the time you filed the FAFSA. Investment debt means only those debts that are related to the investments.

**Business and/or investment farm value includes** the market value of land, buildings, machinery, equipment, inventory, etc. Business and/or investment farm debt means only those debts for which the business or investment farm was used as collateral.

**Business value does not include** the value of a small business if your family owns and controls more than 50 percent of the business and the business has 100 or fewer full-time or full-time equivalent employees. For small business value, your family includes (1) persons directly related to you, such as a parent, sister or cousin, or (2) persons who are or were related to you by marriage, such as a spouse, stepparent or sister-in-law.

**Investment farm value does not include** the value of a family farm that you (your spouse and/or your parents) live on and operate.

#### Section 4

By signing this worksheet, we certify that all the information reported is complete and accurate. You must print this form and provide your signature and date.

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Date

\_\_\_\_\_  
Student's University ID Number

\_\_\_\_\_  
Parent Signature and Date